

Introduction, INPUT Research Methodology

Robert Goodwin
Director, Vendor Research
INPUT



Conference Objectives

- Provide 1988-1993 Information Services Industry Forecasts
 - Revenues by Delivery Mode
 - Growth Rates by Delivery Mode
 - Trends/Issues
 - Driving/Inhibiting Forces
 - Technology Impacts
 - Vendor Activities/Market Share
 - Recommendations

INPUT

NOTES:

JJ88-RG1-2a



Conference Objectives

- Present Research Findings 1988
- Focus on Special Interest Areas:
 - EDI
 - Federal Government
 - European Information Services
 - Customer Support Services
 - Systems Integration
 - Information Systems Trends
 - Telecommunications

INPUT

NOTES:

JJ88-RG1-2b



Conference Objectives

- Forum for 3 Leading IS Vendors
- Opportunity for Informal Peer Discussions
- Recreation

INPUT

NOTES:

JJ88-RG1-2 C



Wednesday A.M.

Introduction

Trends for the 1990s

Market Position—Computer Intelligence

Software Products

IS Management—2000

INPUT

NOTES:

JJ88-RG1-3 A



Wednesday P.M.

Digital Equipment

| | | |
|------------------|-----------------|-----|
| Customer Service | Federal Markets | EDI |
|------------------|-----------------|-----|

Free Time

Cocktail Reception

Dinner Extravaganza

INPUT

NOTES:

JJ88-RG1-3 B



Thursday A.M.

Processing/Network Services Forecast

User Research Finding

Systems Integration Forecasts

Arthur Andersen

INPUT

NOTES:

JJ88-RG1-4a



Thursday P.M.

Telecommunications

| | | |
|------------------|---------------------|---------------|
| European Markets | Systems Integration | User Research |
|------------------|---------------------|---------------|

Free Time

Cocktail Reception

INPUT

NOTES:

JJ88-RG1-4 B



Friday

Turnkey Systems Forecast

Professional Services Forecast

IBM Application Systems Division

CASE Outlook

Wrap-Up, 1989 Programs

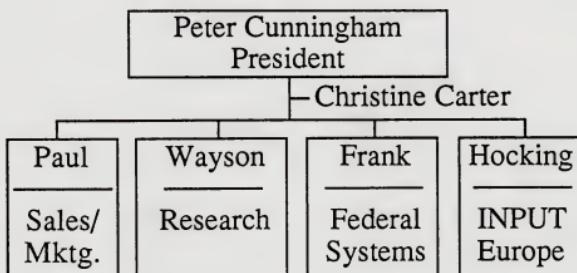
INPUT

NOTES:

JJ88-RG1-5



INPUT Organization



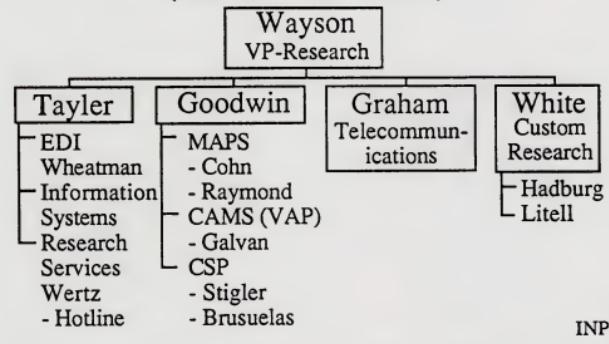
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NOTES:

JJ88-RG1-6



INPUT Research Organization (Mountain View)

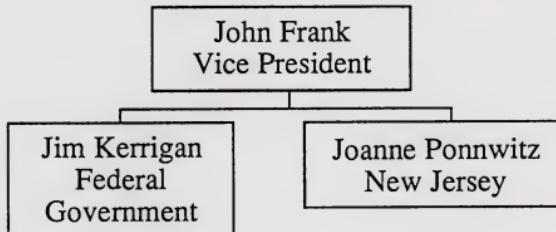


NOTES:

JJ88-RG1-7



INPUT Research
Washington D.C.



INPUT

NOTES:

JJ88-RG1-8



INPUT Research Europe

Keith Hocking
Vice President

Peter Lines
Director, Research

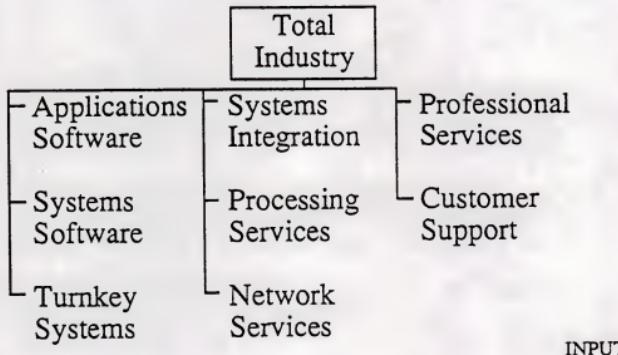
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NOTES:

JJ88-RG1-9



Information Services Industry Structure

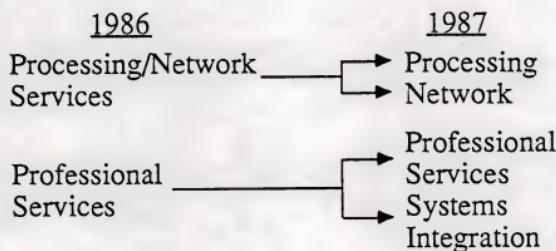


NOTES:

JJ88-RG1-10



Delivery Mode Expansion



INPUT

NOTES:

JJ88-RG1-11 A



Delivery Mode Expansion

| <u>1986</u> | <u>1987</u> |
|--------------|-------------|
| Applications | → Unchanged |
| Software | |
| Systems | → Unchanged |
| Software | |
| Turnkey | → Unchanged |
| Systems | |

INPUT

NOTES:

JJ88-RG1-11 B



Vertical/Cross-Industry Markets

- "Office Systems" Category Added
 - 6 Delivery Modes Forecast for Each Vertical/Cross-Industry Market
 - Subcategories for Selected Verticals
- | | |
|--------------------|----------------------|
| <u>Banking</u> | <u>Manufacturing</u> |
| - Commercial Banks | - CAD/CAE |
| - Savings/Thrifts | - Manufacturing |
| - Brokerage | Control |
| - Other | |
- INPUT

NOTES:

JJ88-RG1-12a, b



Vertical/Cross-Industry Markets

Medical

- Hospitals
- Physicians/Clinics
- Other

Federal

- DoD
- Civilian

Insurance

- Life/Health
- Property/Casualty
- Agency

State & Local

Government

- State
- Local

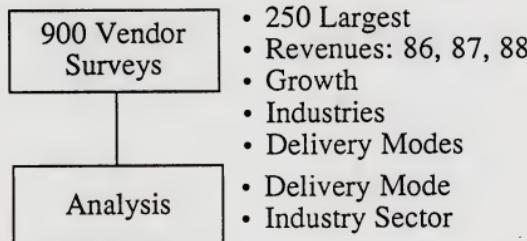
INPUT

NOTES:

JJ88-RG1-12 C,D



Research Methodology



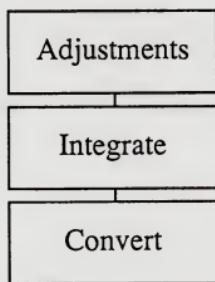
INPUT

NOTES:

JJ88-RG1-13a



Research Methodology



- Large Companies
- Small Companies
- Delivery Mode
- Industry
- Vendor \$ to User Exp.

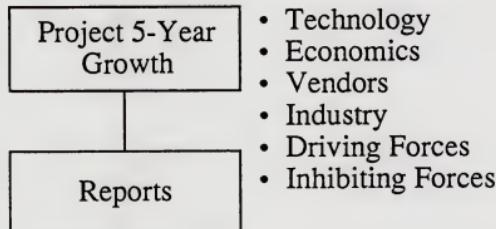
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NOTES:

JJ88-RG1-13b



Research Methodology



INPUT

NOTES:

JJ88-RG1-13c



All INPUT Forecasts Are for U.S.
Non-Captive User Expenditures,
in Current Period Dollars.

INPUT

NOTES:

JJ88-RG1-14



Inflation Assumptions

| | '88 | '89 | '90 | '91 | '92 | '93 |
|--|-----|-----|-----|-----|-----|-----|
| Consumer Price Index,* Percent Change Year-to-Year | 4.3 | 4.1 | 3.6 | 3.2 | 2.7 | 2.2 |

* For urban wage earners, and clerical workers

Source: President's Council of Economic Advisors, February 1988

INPUT

NOTES:

JJ88-RG1-15



Economic Growth Assumptions

| | '88 | '89 | '90 | '91 | '92 | '93 |
|--|-----|-----|-----|-----|-----|-----|
| Real GNP Percent Change, Year-to-Year | 2.9 | 3.1 | 3.5 | 3.4 | 3.3 | 3.2 |

Source: President's Council of Economic Advisors, February 1988

INPUT

NOTES:

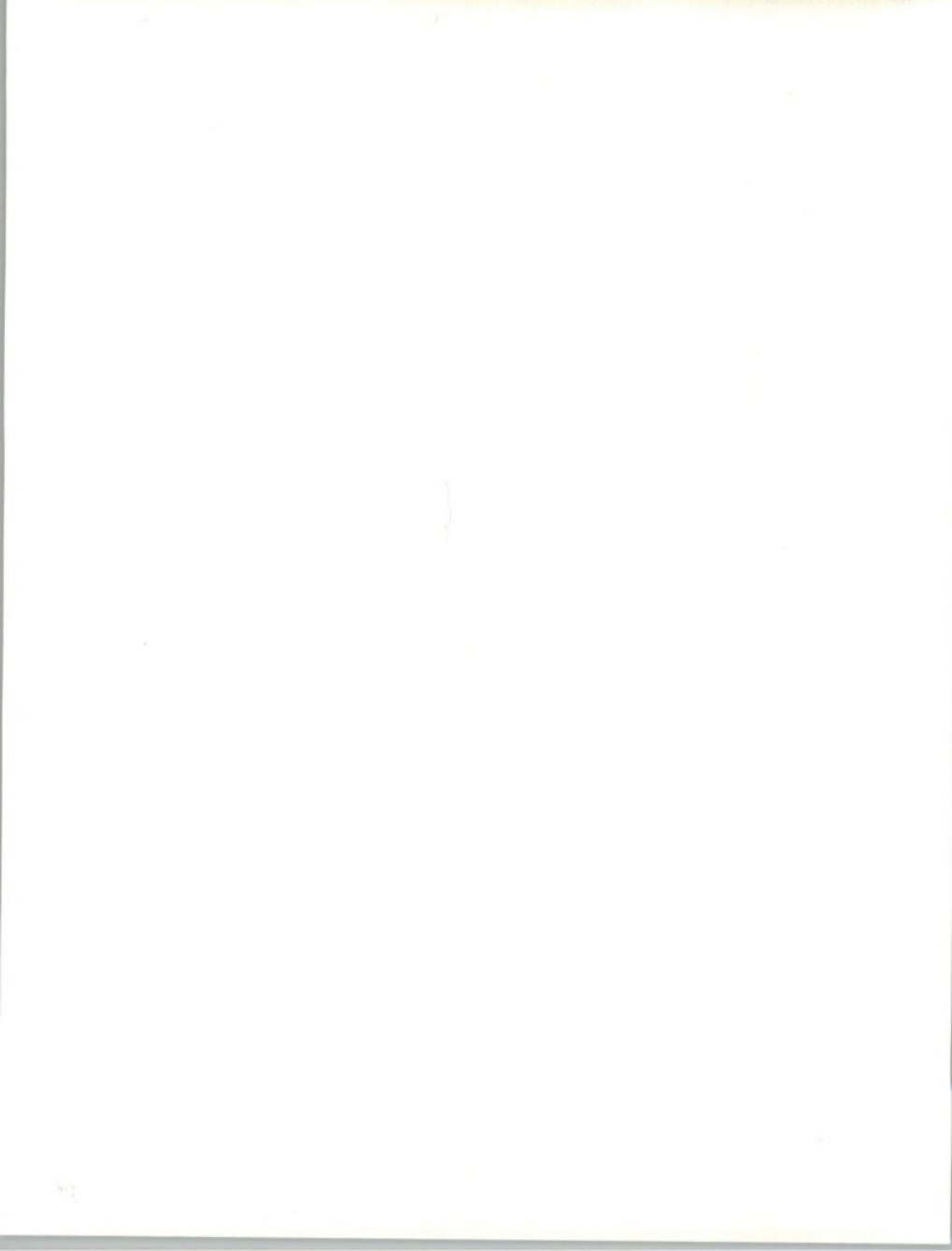
JJ88-RG1-16



Robert L. Goodwin
Director, Vendor Research
INPUT

Robert L. Goodwin directs INPUT's vendor-related research and is responsible for development and quality of all INPUT forecasting activities. He has more than 25 years of successful sales, marketing, and general management experience in the computer equipment, remote processing services, and software industries. Mr. Goodwin's expertise spans many areas of information services, including business plan development, strategic partnering, acquisitions, VAR, and reseller operations. He held senior management positions at both large and midsize corporations, including positions as President of Command Data Systems, Director of Marketing with Xerox Computer Services, and Branch Manager for IBM.

Mr. Goodwin holds a B.S. degree from Occidental College and has attended the MBA program at Golden Gate University.



①

INPUT

~~CLIENT~~

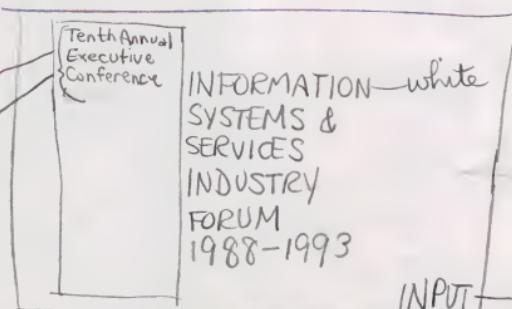
INFORMATION

SERVICES

FORUM

SCOTTSDALE ARIZONA
SEPTEMBER 28-30, 1988

Yellow
Outline
Yellow
Text



INPUT - yellow

special



Introduction
and
Input
Research →
Methodology

Robert Johnson
Director, Vets Research

INPUT

①

Company Analysis and Monitoring Service (CAMS) 1988 Directory

New Entry
 Revised

Provide as much data as known. Partially complete forms are welcome.

Vendor Name: _____

Address: _____

Phone Number: _____

CEO/President: _____

Key Contact: _____
(Name) _____ (Title) _____

Total Employees: _____

Company's Primary Business: _____

Annual Revenue \$ _____
or—Revenue Range: _____

Fiscal Year Ending _____ / _____ / _____
Mo Day Yr

- Under \$1 Million \$10-20 Million
 \$1.5 Million Over \$20 Million
 \$5-10 Million

What percent of your revenue is derived from:
U.S. _____ % International _____ %

What percent of your revenue is derived from information services?
_____ %

What percent of information services revenue is derived from the following delivery modes:

| | |
|-------------------------------|---------|
| Application Software Products | _____ % |
| Systems Software Products | _____ % |
| Processing Services | _____ % |
| Network Services | _____ % |
| Turnkey Systems | _____ % |
| Professional Services | _____ % |
| Systems Integration | _____ % |
| Total | 100% |

Target Industries: _____

Type of Ownership:

- Public Subsidiary
 Private Division

Parent Corporation: _____

Subsidiaries: _____

Submitted by: _____

*Please put INPUT on your mailing list and send product literature.
Thank You.*

Coface OBJECTIVES

- Provide 1988-1993 information
choose industry forecasts
 - revenue by delivery mode
 - growth rates " "
 - trade/delivery force issues
 - vendor activities/market share
 - technology reports
- Present industry research findings
1985

- ~~Focus on specific function/project areas:~~ ~~Trade Integration~~
- EDI
 - Federal Government IS
 - European IS
 - Federationization
 - Customer Support
 - Data Interchange System
 - Financial services
 - Insurance services
 - Postal services

- Forum for ³ leading IS vendors
- Opportunity for informal peer discussions
- Recreation

- Focus on special interest areas:
 - EDI
 - Federal Government
 - Single IS
 - Customs System/Services
 - Telecommunication
 - ESDC user needs
 - Information Systems Trade

make 2 col.
or 2 slide. AM/PM.

| WEDNESDAY | | | |
|----------------------------------|--------------------|-----|--|
| | | | |
| Introduction | | | |
| Keynote: Trends for the 1990s | | | |
| Market Position | | | |
| Software Products | | | |
| IS Management | | | |
| Lunch | | | |
| Customer Service | Federal Markets | EDI | |
| Free Time | | | |
| Cocktail Reception | | | |
| Dinner Extravaganza | | | |



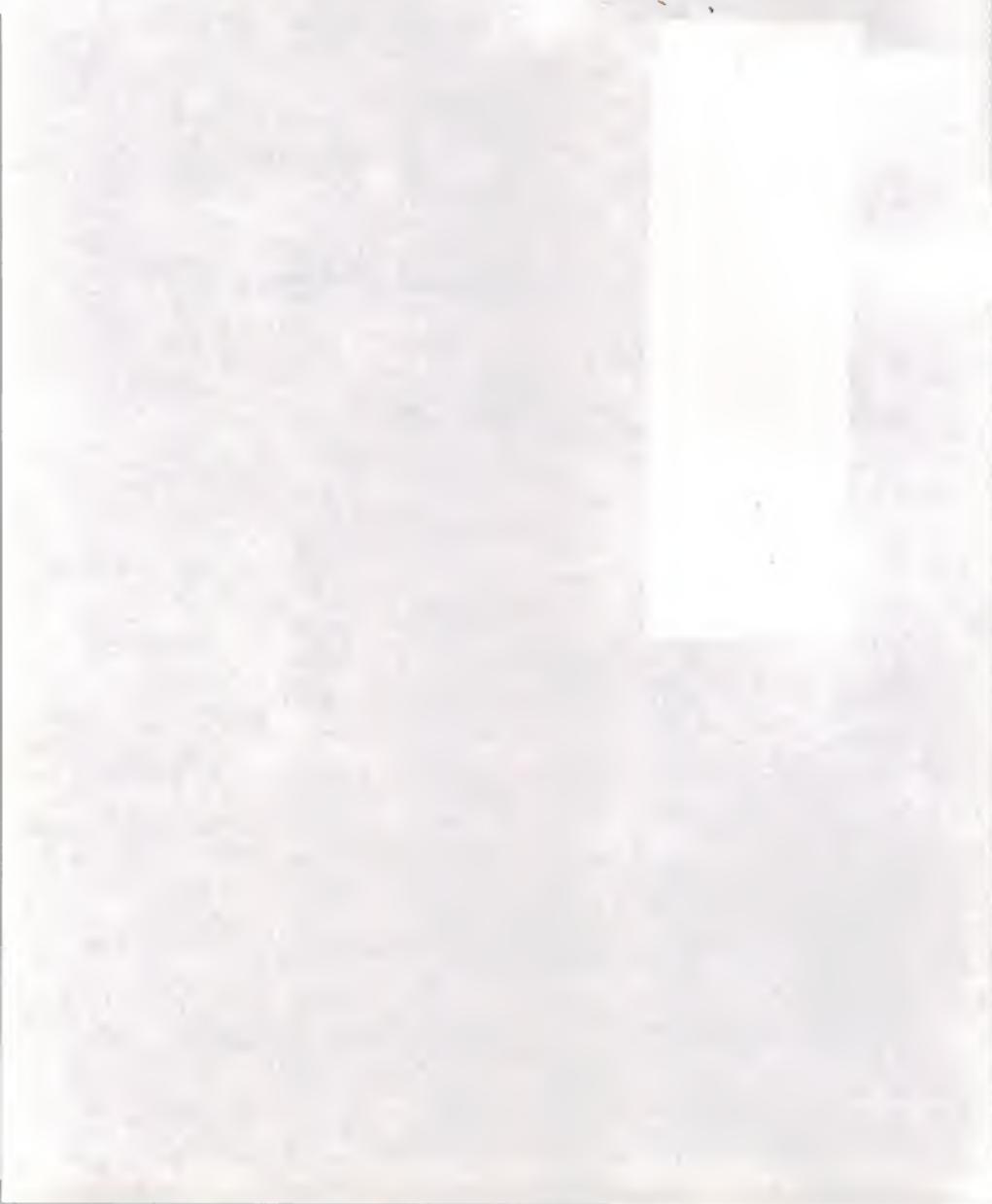


Thursday

| THURSDAY | | |
|---------------------------------------|---------------------|---------------|
| <u>Continental Breakfast</u> | | |
| Processing/Network Services Forecasts | | |
| User Research Findings | | |
| SI Forecasts | | |
| Guest Speaker (FBA) | | |
| Lunch | | |
| Telecommunications | | |
| European Markets | Systems Integration | User Research |
| Free Time | | |
| Cocktail Reception | | |

— arthur andersson

estate 90°

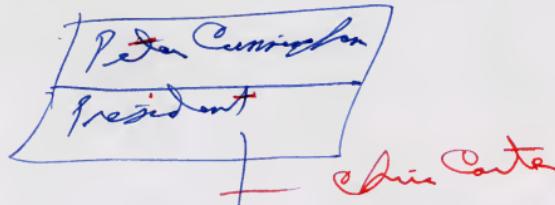


| FRIDAY |
|--------------------------|
| 4 |
| Turnkey Systems Forecast |
| Professional Services |
| Forecast |
| IBM Application Systems |
| Division |
| CASF Outlook |
| Wrap-Up |
| 1989 Programs |



INPUT

ORGANIZATION



RAZZ PAUL
Idea/PR/KTC

RESEARCH

JOHN FRANK
IT
Database
System

KAREN DICKIN
INPUT EUROPE

- Nancy Hill
- George Hunter
- John March
- Jason Thorpe Radford
- Jason Price
- Doris Jones

Database

OPTIMAL



11/20/01 Research Organization (Mountain View)

Denny Wayson
VP - Research

Doug Taylor

Vic Whetstone
EDI
~~new information system program~~
~~research~~
~~etc~~
- Kim Wertz
unresearch services
- Hollie

Bob Hodson

MAPS
- Mike Cola
- Darryl Lopwood
CATS(VAP)
- Terje Falon
Customer support
Buddy Shuler
- Rich Busundoe

Alex Graham
Telecommunications

3
Pats

Denny Weller
Custom Research

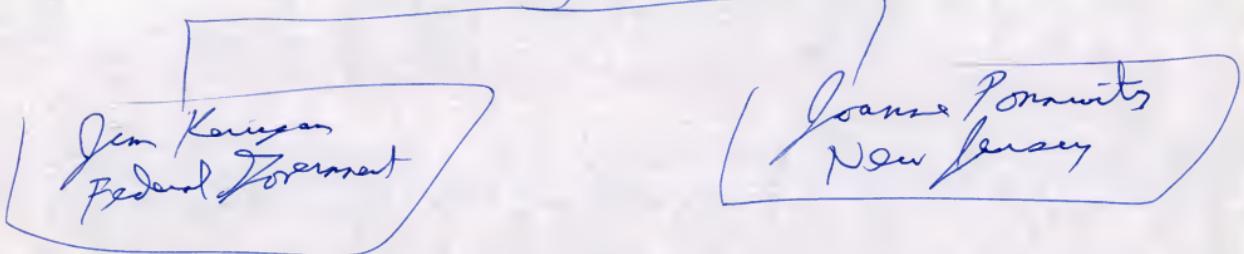
Cars
Denny Weller
Howard Norman
Lillard

(Drew - if so soon, you can delete names of people not in boxes, leave program name.)



INPUT - Working
Research - Washington D.C.

| John Brooks
Vice President





Joint Research - UK
Europe

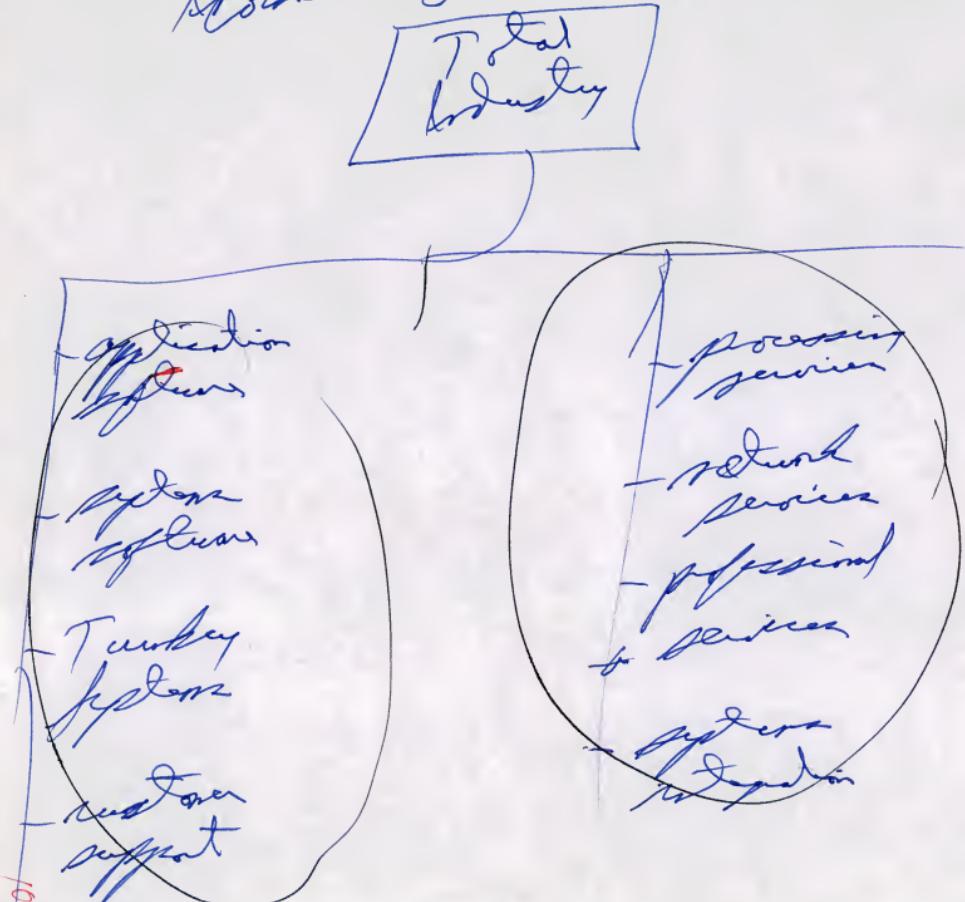
Karl Hocking
~~President Europe~~
Director VP

Peter Jones
Director, Research
Director





Coronation Services Industry Structure



as many
col. as
poss. nee.



Delivery Note Expansion

See
After

1986

1986

1987

P

10

Processing/
Network
Services

Processing
Network

Professional
Services

Professional
Services
System
Integrations

Applications
Software

→ workflow

System
Software

→ "

Turnkey
Systems

→ "

(New)

Vertical/multi-industry market

~~Offer~~

10

- "Office system" category added
- → delivery note present for each valued/
non-valued multi-industry market
- Sub-categories for selected verticals

Banking

- Banks commercial
- Savings/Personal
- Brokerage
- Other

Manufacturing

- CAD/CAM
- Manufacturing control

Medical

Hospital

Physician/Clinic

Other

Government

- Federal/State/Health
- Regional/Local
- Agency

~~Offer~~

Federal

DOD

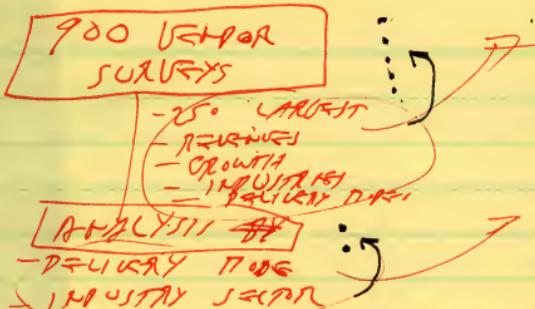
CIA/DIA

State & Local government

- State
- Local

10

Research Methodology



B10

ADJUSTMENTS FOR:

LARGE COMPANIES
SMALL COMPANIES

INTEGRATE

DELIVERY MODE
INDUSTRY

CONNECT

PROVIDE
USER EXP.

B11

PREDICT
5-YR GROWTH

DETAILED
EX-NOTICE
- REPORTS
- INDUSTRY
- DRIVING PRICES
- INNOVATION

5-YR
PER
REPORT

B12

Order - d
want to insert
this into the
III introduction
section - could be
several slides.

| Bol
|
| want to p.
| 13, 13a.

non
system

Old budget forecast one for U.S.
user expenditures, in current period dollars

+314

INFLATION ASSUMPTIONS

| | 88 | 89 | 90 | 91 | 93 | 93 |
|--------------------------|-----|-----|-----|-----|-----|-----|
| CONSUMER PRICE INDEX* | 7.3 | 4.1 | 3.6 | 3.2 | 2.7 | 2.2 |
| % CHANGE EX-YEAR | | | | | | |

*for urban wage earners and clerical workers

Source: President's Council of Economic Advisors,
Feb. 1988

ECONOMIC GROWTH ASSUMPTIONS

| | <u>81</u> | <u>89</u> | <u>90</u> | <u>91</u> | <u>92</u> | <u>93</u> |
|--|-----------|-----------|-----------|-----------|-----------|-----------|
| REAL GDP | 2.9 | 3.1 | 3.5 | 3.4 | 3.3 | 3.2 |
| % change, ^{YEAR TO YEAR} YEAR | | | | | | |
| | | | | | | |

SOURCE: President's Council of Economic Advisors,
Feb. 1989

KU

~~Input Research Production
Procedures~~

- Primary research
 - Interviews (before)
 - 600 in 1987
 - Users
 - Vendors
- Secondary sources in IAPC information centre
 - report
 - journals
- Analysis by senior managers and consultants
 - 20 years + experience in floriculture & system markets
- Written reports, and newsletters and bulletins

